

R = Required
I = Important
N = Nice to have
E = Explore

City of Hayward, CA

Community Services Requirements

	Vendor Background	Comments
	1. Company	
	▪ Company Name	
	▪ Contact Person Name and Title	
	▪ Contact Address, Phone, Email	
	2. Company Information	
	▪ Public vs. Private	
	▪ Year Founded	
	▪ Revenue and Income: Current and Prior Year	
	▪ Office Locations: Headquarters, Implementation, Support, Development	
	▪ Nearest regional office to Hayward, CA	
	▪ Website	
	3. Vendor Employee Count	
	▪ Company Total	
	▪ Proposed Software Division - Total	
	▪ Proposed Software Division - Support	
	▪ Proposed Software Division - Development	
	4. Number of Customers	
	▪ Proposed Software - Total	
	▪ Proposed Software - Total in US	
	▪ Proposed Software - Total in California	
	▪ Proposed Software - Total Cities	
	▪ Proposed Software - Total Cities in California	
	5. Target Customer Profile	
	▪ Target Industry	
	▪ Sizing - Users and Population	
	6. Implementation Model: Direct or Partner	
	7. Version Schedule	
	▪ Current version and release date	
	▪ Typical release schedule	
	▪ Number of prior versions supported	

	Pricing Summary	Comments
	8. Software License:	
	<ul style="list-style-type: none"> 120 Named and 20 Mobile Users. 10 for electronic plan review. 	
	9. Implementation: Estimated total cost of all services including installation, training, configuration, integration, data conversion, travel, etc.	
	10. Maintenance: Percent of software license cost and amount – Year 1 and Years 2-10	
	11. Database: License and maintenance costs	
	12. Other: Hosting, licensing, subscription, etc.	
	13. Total Cost – Year 1	
	14. Total Cost – 10 Years	
	Modules	Comments
R	15. Permitting and Land Management	
R	16. Inspections	
R	17. Code Enforcement	
R	18. Queries and Reporting	
E	19. Business Licensing	
	Technology	Comments and Rating
R	20. Preference for MS Windows Server 2012 R2 Platform.	
R	21. Preference for MS SQL Server 2012 R2 database.	
	<ul style="list-style-type: none"> Database: List % of installs by database. 	
	<ul style="list-style-type: none"> Platform: List % of installs by platform. 	
R	22. Ability to run on Virtual Machines, e.g. VMware.	
R	23. Web-enabled or Web-based architecture with published open API's.	
R	24. Compatible with Windows 7 or higher desktop client, 64-bit.	
R	25. Role-level security to menu, screen and field level.	
R	26. Single sign-on: MS Active Directory, LDAP compatible.	
R	27. Microsoft Office integration with Word and Excel (mail merge, letters, data extraction, reporting etc.).	
R	28. Interoperability with Office 365 and Outlook – email generation, calendaring, etc. Describe functions supported.	
N	29. Instant Messaging from desktop or dashboard.	
N	30. System-generated text messages.	
R	31. List integration technologies, e.g. Web Services, SOA, XML, etc.	
R	32. Indicate experience integrating with software listed and method proposed (Web Services, API preferred):	

R	a. Esri 10.4.1 Geodatabase	
I	b. PDF Editor – Electronic plan review	
R	c. Tele-Works IVR – Inspection requests	
R	d. MUNIS 10.5 – GL, AP, AR, Projects (moving to 11.2)	
E	e. Tyler Cashiering – Central cashiering	
R	f. MUNIS Payroll – import employee cost information for customer billings	
R	g. Accela GOV Outreach – Mobile Citizen app for Code Enforcement system	
E	h. Envision Connect – Compliance tracking solution for CERS System e.g. Hazmat code case initiation, inspection results, etc.	
R	33. Indicate degree of Esri GIS integration and compatibility/ experience with Esri's Local Government Model for GIS data.	
R	34. Scan and attach documents to records in multiple formats including PDF, JPEG, TIF, DWG, Word, Excel, etc.	
R	35. Identify which Operating Systems and device types are supported for mobile access.	
R	36. Describe functions supported via mobile devices, e.g. approvals, inspection scheduling and resulting, Code Case entry, etc.	
I	37. Store and forward mobile data entry for areas with poor or no mobile network connectivity.	
I	38. Online Data Dictionary.	
E	39. Describe internal and external Web/Portal functions supported. Prefer ability to apply, estimate fees, make payment, schedule inspections, look up parcel data, check zoning, check Permit status and print simple Permit types or licenses.	
General Requirements		Comments and Rating
R	40. Configurable role-based dashboards to present reports, tasks, notifications, etc.	
R	41. Audit Trail with user, date, time stamp throughout all modules. Before/after history is Important.	
R	42. User configurable menus, screens, fields and tabs.	
R	43. Searchable online help and user manuals; context sensitive help is Important.	
I	44. Role-tailored screen forms by operational group.	
R	45. Rules-based multi-level workflow; concurrent, sequential, by Permit type, complaint type, etc. with ability to add an approver while in process.	
R	46. Digital signatures for reviews, approvals, etc.	

R	47. Rules-based alerts or notifications triggered by actions or dates, e.g. property ownership changes.	
R	48. Attach files to transactions within the system they relate to.	
R	49. Global record repository of data. Enter field data once, update across all records, modules, and departments.	
R	50. Track parcel genealogy including parent/child relationships, splits, merges, retired parcels, etc.	
R	51. Configurable forms tools to create electronic applications that can be routed for approval and update transactions.	
R	52. Compliance with State and Federal reporting requirements, e.g. Strong Motion Fee reports.	
I	53. Manage California Environmental Quality Act data (CEQA): filing date, level of review, contracted studies, notes, documents, deadlines, etc.	
E	54. Mural Art Program: City tracks Graffiti-prone areas for Art Mural program; contracts with artists and business owners for Mural placement. Some grant funded. Describe an approach for managing this program within the software.	
Permitting and Land Management		Comments and Rating
Land Records, Master File and Activity		
R	55. Tie a Parcel to an Assessor Parcel Number (APN).	
R	56. Capture parcel history including parcel changes, street name changes, subdivisions, zoning, etc.	
R	57. Capture Parcel Address, Sub-Lots, Legal Description (Plat), Property ID, Geo-parcel ID, Lat./Long coordinates, etc.	
I	58. Convert temporary address record to final address within the same record.	
R	59. Unlimited Permit categories, types and sub-types with unique fees for each, e.g. Building, Commercial, Residential, Fire, etc.	
R	60. Manage Tract Permits: Multiple Permits, same subdivision with different plan types, square footages, etc. Submitted 10 at a time. Would like ability to copy and clone multiple Permits in a single action.	
R	61. Calculate Base Building Permit fee based on tiered valuation, e.g. \$50,001 to \$100,000 at \$815.70 for first \$50,000 plus \$8.87 for each additional \$1,000 or fraction thereof up to \$100,000	
R	62. Add additional fees to Base Building Permit fee, e.g. add 80% for Plan Check Fee; 15% for electrical inspection fee, 12% for plumbing Inspection fee, and aggregate for total Permit fee.	
R	63. Calculate Tract Fees. Based on Project size threshold to determine Base Cost plus additional cost per each square foot. Example 6,500 Sq. Ft. = \$7,081 base, plus \$30 for each additional 100 sf. Or fraction thereof.	

R	64. Calculate non-valuation Permit fees, e.g. Plan Check hourly fee, Demolition – 0-3000 Sq. Ft. = \$374 plus \$174 for each additional 3,000 square feet, Kitchen Remodel \$359, etc.	
R	65. Date effective fee updates.	
R	66. Unlimited Permit line item charge codes with unique General Ledger distribution for each.	
R	67. Define Permitting activities or checklists including application intake; ensure all data is gathered and all steps followed for completion.	
R	68. Attach a Permit to a line, road, or polygon.	
R	69. Manage Pre-Application process; schedule meetings (Outlook), review committee comments and recommendations list for Permit application submittal, etc. Retain data and attach documents for historical purposes.	
R	70. Online Permit application submittal. Online fee estimator tool is Important.	
R	71. Initiate an activity in the system via parcel map.	
R	72. Track multiple contacts and addresses for a Permit (e.g. Applicant, Owner, Contractor, Architect, Electrician, etc.).	
R	73. Support electronic submission of plans and attach to a Permit application.	
R	74. Link related Permits.	
R	75. Produce required notification for specific Permit types based on polygon or buffer zone on map.	
R	76. Track and manage time elapsed for review process based on calendar days, business days or both. Stop clock if sent to applicant for correction and restart once resubmitted.	
R	77. Track, manage and report on Projects; all Permits and Activities.	
I	78. Track and report on Project status including milestones, hearing progress, due dates, legal notification dates, etc.	
I	79. Capture 256+ character Project description field in master file and related Permits.	
R	80. Capture Project contact management data and activities including calls, emails, attachments; property owner, applicant, contractor, sub-contractor, etc.	
I	81. Track Project change management and change history.	
	Review	
I	82. Manage routing of Permit review to external parties.	
R	83. Define library of comments and conditions that can be selected and added to Permits, letters, notifications, etc. or allow freeform text.	

R	84. Large notes field for recording review comments (256+ characters) with ability to cut and paste from Word document. Indicate characters available.	
R	85. Dashboard view of reviews required by department.	
R	86. Notify of past-due workflow review; escalation to next level approver is Important.	
I	87. Date and time tracking for Permit processing and review activities; report on intervals for each step.	
I	88. Electronic Plan Review, with comments, markup and signature by multiple reviewers. Describe tool proposed.	
R	89. Capture and consolidate Permit review comments and approve/deny status by reviewer into a single notification.	
R	90. Charge staff review or inspection time at actual pay plus overhead, time and materials, or flat fee by department. Generate invoice to customer or apply against deposit or Plan Review fees. Ability to track hours by activity is Important.	
I	91. Support zoning review at time of Permit application.	
R	92. Online Permit review approval queue.	
R	93. Permit corrections or changes trigger workflow for all required approvers.	
I	94. Date effective Permits with expiration dates and ability to extend expiration date.	
I	95. Alert, notification or report when nearing Permit expiration date (e.g. within 30 days).	
R	96. Assess 1% fee to Permits for Seismic Retrofit Program, with separate General Ledger distribution; ability to pass to Accounts Payable for payment is Nice to Have.	
R	97. Disallow Permit printing if mandatory fields, fees, holds, or inspections are missing.	
I	98. Manage transactions related to Developer Deposits, e.g. initial deposit, Permits issued, etc.	
I	99. Track multiple Deposit accounts to a single developer. Apply draws against specific Permit case.	
Inspections		
R	100. Define multiple inspection types with sub-categories, hierarchies and checklists.	
R	101. Interface with IVR for applicant inspection requests (Tele-Works).	
R	102. Online applicant request for inspections in A.M. or P.M. or ability to schedule time on back-end; prefer both options.	
R	103. Support scheduling of inspections; prefer integration with MS Outlook Calendar, specific appointment times, etc.	

R	104.Set default inspector based on Permit type and assigned area; track assignment based on actual inspector, not assigned one.	
I	105.Reassign all inspections from one Inspector to another.	
I	106.Assign a combination of inspectors for Commercial Permits by type and area, e.g. Area 5 is assigned specific inspectors.	
I	107.Generate route map using Google Map interface.	
I	108.Create a packet of documents required for inspection, e.g. images, maps, grade plans, improvement plans, etc.	
R	109.Add an inspection while in process; not pre-defined.	
R	110.Mobile and in-office update of inspection results; pass/fail, correction notices, re-schedule, status, etc. iPhone preferred.	
I	111.Group all inspections for routing at a single site.	
N	112.Mass inspection resulting, e.g. development tract, all pass foundation inspection.	
N	113.Auto-generate Certificate of Occupancy once all inspections are finalized.	
I	114.Post inspection status on Web site or Portal in chronological order.	
I	115 Dropdown list to choose and populate correction notices with standard language, code descriptions, link to building code, etc.	
R	116.Issue Stop Work order in the field; generate a fee or send a notice. Pass to other department for action.	
I	117.Add photos to an inspection via mobile device.	
R	118.Trigger a new Permit or Inspection during resulting process of scheduled Inspection.	
I	119.Track and bill non-Permit related periodic annual inspections, e.g. Housing, Fire and HazMat staff. Alternatively push billing information into Tyler Munis.	
	Code Enforcement	Comments and Rating
R	120.Unlimited user-defined code case types.	
R	121.Online citizen access to submit requests or complaints with mandatory fields. Generate acknowledgment email.	
R	122.Staff or citizen complaint submitted via a mobile device.	
I	123.Add new complaint information to an existing Code Case.	
R	124.Ability to keep specific field or tab of information confidential.	
R	125.Auto-assign Code Case number as complaints are received.	
R	126.Assign a priority to a Code Case; Low, Medium, High.	
I	127. Set up a Code Case involving multiple departments and/or external agencies.	
R	128.Schedule inspectors using a central calendar; Outlook preferred.	

R	129.Add attachments to Code Case; e.g. pictures, documents, email, etc.	
I	130.Drop-down list of corrective actions based on violation type.	
I	131.View entire code case file at a glance; single screen.	
R	132.System-generated letters based on pre-defined template (Courtesy Notice, Notice of Inspection, Progress Check, Notice to Abate, etc.) with list of violations, required corrective actions, key dates, etc.	
R	133.Designate who notices are sent to, e.g. property owner, property manager, tenant, all, or select individuals.	
I	134.Generate invoices based on Code Case information.	
N	135.Ability to print all or selected documents related to a case, e.g. photos, letters, inspection results, etc. in a single action.	
R	136.Issue and track Stop Work Orders related to a violation; alert or notify Building department.	
I	137.Issue and print citations in the field.	
I	138.Track Code cases through to resolution with visibility to where they are in the overall process, e.g. appeals, request for hearing, determination, Permit compliance, etc.	
I	139.Ability to visualize via google maps or GIS API active code cases by case type.	
R	140. Ability to create custom forms or letters as well as standardized forms and Notices.	
	141. Ability to track changes to case by active user, and ability to maintain case history in printable format to include major case components (i.e.: images, notes, violations, property owner information)	
Queries and Reporting		Comments
R	142.Describe end user reporting tools to support standard and ad hoc reporting.	
R	143.Describe user level query tools (i.e. wild card search, drop down lists, etc.) to facilitate look-up by parcel I.D., owner name, partial address, contractor name, project #, etc.	
R	144.Reporting across modules on all standard and user-defined fields.	
R	145.Date-range and parameter-based queries and reports.	
I	146.Ability to modify standard reports to create and save new ones that can be shared or kept private.	
R	147.Drill down to source transactions and attachments from queries and reports.	